

State Procurement Manual

Top 10 “Need to Knows” & What’s Next



1. Reinforce Ethical Principles of Procurement



- The ethical code of conduct for procurement professionals has long been a guiding point in training; it is now codified in policy
- Reinforced fairness, integrity, openness with other policies related to avoiding conflict of interest, expanded policy content related to endorsement, prohibition of using the Great Seal

2. Standardized Recordkeeping



- There is a new form required for use in creating and retaining an official procurement file for all competitive procurement methods and RFIs
- This tool is mandatory except best judgment
- The current (existing) forms for RPA checklist and grant exemptions should stand to serve as official recordkeeping guidance
- For all management review activities after September 16, 2019, we expect to see procurement files created using this new form

3. More Options for Strategic Sourcing



- Clarified the term for review of serial purchasing (fiscal year) for minimum compliance
- However, as a best practice, we need to do more with strategically sourcing repeat purchases (reduce tail-spending, consolidate repeated purchases)
- Added new tools for various RFI types to vet market in advance of a solicitation and offered a template cover letter to use if doing a draft solicitation for vendor comment

4. More Comprehensive Procurement Plans



- We have added fields to the proc plan form to address compliance with other policies:
 - IT
 - CBA
 - Collaborative Contracting
 - Piggybacking
 - Extended Contracts

5. Services Are Special

- We have added fields to the proc plan form to address compliance with other policies:
 - CBA threshold is based on annual spend
 - Justification must be completed regardless of CBA exemption
 - Must have named contract admins
 - Must document CBA exemptions



6. Focus on Sustainability



- Various elements to sustainable purchasing
- Specification development (recycling, recyclability, recovered, energy use) and reduction of solid waste
- Favor durable or multi-use items over single-use/disposable
- Purchasing on contract more sustainable options
- Making award decisions using life cycle costing, which takes energy consumption into consideration
- “Technically and economically feasible”

7. Lowest Responsive, Responsible Bidder

Responsive

- Required specs
- No material (price) omissions
- Fundamentally complete

Responsible

- Financial ability
- Skill, judgment, experience, resources
- Facilities, staff equipment
- Demonstrated performance
- Demonstrated ability
- Any other relevant factor



8. RFPs Are More Structured



- Need to have evaluation criteria developed before proposals are due
- Need to summarize any pre-opening conferences in writing and post with RFP documents
- When doing a cost BAFO, you are only comparing the cost proposals of the remaining short-list of proposers (“reasonably apt to be considered for award”)
- Need to document more information about SMEs, handling of cost scoring and disclosure

9. Back to Basics (Contract Eligibility)



Regardless of method of selection, certain requirements must be met in order to make a purchase or a contract with a vendor.



10. Contract Administration is a Responsibility



- Named contract admin has been a requirement for service contracts because of Admin Code
 - Now strongly recommended for every commodities contract to also have a named contract admin with same responsibilities
 - Refreshed content on responsibility to document contractor performance and escalation from procuring agency to DOA as necessary
- Must post contracts to VendorNet except those for one-time purchases



Questions?



What's Next for CBAs?

- Research additional improvements that can be made to increase efficiencies for this process to account for what is legally required and use the data in a more valuable way
- Research system solutions for reporting, means to auto-generate data for contractual services report



What's Next for IT Procurement Policy?



- With the heightened emphasis on high risk IT contract requirements, we will be creating a toolkit for managing high risk IT solicitations
- Toolkit to contain:
 - Reiteration of the policy through practical application
 - Sample clauses to use for varying levels of risk and data types (if cloud)

What's Next for Procurement Plans?



- The Bureau is currently building and beginning to test the automation of the procurement plan approval process
- Using RPA.wi.gov, Proc Plans will be a new transaction type for agencies to complete online pages and track approval progress
- Estimated Go-Live: Spring 2020

What's Next for Management Reviews?



- Align our auditing tools and practices to the new requirements of policy
- Will provide agencies with written feedback on audit in timely manner
- Will keep an official file for each delegated agency as it relates to performance, not just findings in a management review

What's Next for Coding & Use of Systems?



- We intend to strengthen policy as it relates to the use of prescribed, specific codes on state purchase orders, PCards
- STAR agencies will have different procedures; general policy will apply to all
- Use of NIGP codes on purchase orders
- Level of prescription of codes
- Tightening use of VendorNet for STAR agencies

What's Next for the Manual?

Suggestion for change,
new content



Agency SDA or CAPS Section Chief or UW
System SDA (if non-Madison campus)



SDA/CAPS Section Chief sends to
SBOP Director/Deputy Director



IPC



SBOP reviews with
DOA Legal, as needed



SBOP SPM Editor
publishes change





Questions?

